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Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

2012Department of the Treasury
Internal Revenue Service

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2012, or tax year beginning , 2012, and ending

THE LUBAR FAMILY FOUNDATION, INC.
700 N. WATER ST. -- SUITE 1200
MILWAUKEE, WI 53202-4206

A Employer identification number
39-1098690

B Telephone number (see the instructions)
414-291-9000

C If exemption application is pending, check here ☐

D 1 Foreign organizations, check here ☐

2 Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16)
\$ 34,081,521.

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) (Part I, column (d) must be on cash basis) --

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

REVENUE	1	Contributions, gifts, grants, etc., received (att sch)	4,662,380.			
	2	Check ☐ if the foundn is not req to att Sch B				
	3	Interest on savings and temporary cash investments	331,986.	331,986.		
	4	Dividends and interest from securities	172,052.	172,052.		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain/(loss) from sale of assets not on line 10	267,352.			
	b	Gross sales price for all assets on line 6a	267,352.			
	7	Capital gain net income (from Part IV, line 2)		267,352.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
ADMINISTRATIVE AND OPERATING EXPENSES	b	Less: Cost of goods sold				
	c	Gross profit/(loss) (att sch)				
	11	Other income (attach schedule)				
		SEE STATEMENT 1	-30,096.	-30,096.		
	12	Total. Add lines 1 through 11	5,403,674.	5,401,294.	0.	
	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach sch)				
	c	Other prof fees (attach sch) SEE ST 2	6,860.	941.		
	17	Interest				
	18	Taxes (attach schedule) (see instrs) SEE STM 3	23,272.	3,272.		
	19	Depreciation (attach sch) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule) SEE STATEMENT 4	61,260.	61,061.		
	24	Total operating and administrative expenses. Add lines 13 through 23	91,392.	65,274.		
	25	Contributions, gifts, grants paid PART XV	2,757,027.			2,757,027.
	26	Total expenses and disbursements. Add lines 24 and 25	2,848,419.	65,274.	0.	2,757,027.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	2,555,255.			
	b	Net investment income (if negative, enter -0-)		676,020.		
	c	Adjusted net income (if negative, enter -0-)			0.	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
ASSETS	1	Cash — non-interest-bearing		1,248,002.	1,500,409.	1,500,409.
	2	Savings and temporary cash investments		259,740.	30,672.	30,672.
	3	Accounts receivable				
		Less: allowance for doubtful accounts				
	4	Pledges receivable				
		Less: allowance for doubtful accounts				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach sch)				
		Less: allowance for doubtful accounts				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments — U.S. and state government obligations (attach schedule)				
	b	Investments — corporate stock (attach schedule) STATEMENT 5		1,657,566.	5,055,782.	5,403,312.
	c	Investments — corporate bonds (attach schedule)				
	11	Investments — land, buildings, and equipment basis				
	Less: accumulated depreciation (attach schedule)					
12	Investments — mortgage loans					
13	Investments — other (attach schedule)					
14	Land, buildings, and equipment basis					
	Less: accumulated depreciation (attach schedule)					
15	Other assets (describe SEE STATEMENT 6)		26,869,290.	26,002,990.	27,147,128.	
16	Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)		30,034,598.	32,589,853.	34,081,521.	
LIABILITIES	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, & other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe)				
	23	Total liabilities (add lines 17 through 22)		0.	0.	
NET FUND ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.		X			
	27	Capital stock, trust principal, or current funds		30,034,598.	32,589,853.	
	28	Paid-in or capital surplus, or land, building, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances (see instructions)		30,034,598.	32,589,853.	
	31	Total liabilities and net assets/fund balances (see instructions)		30,034,598.	32,589,853.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	30,034,598.
2	Enter amount from Part I, line 27a	2	2,555,255.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	32,589,853.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	32,589,853.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)

(b) How acquired
P — Purchase
D — Donation(c) Date acquired
(month, day, year)(d) Date sold
(month, day, year)

1 a FLOW THROUGH FROM LCPEF, LLC	P	VARIOUS	VARIOUS
b FLOW THROUGH FROM LCPEF, LLC	P	VARIOUS	VARIOUS
c FLOW THROUGH FROM LCTF, LLC	P	VARIOUS	VARIOUS
d FLOW THROUGH FROM LCTF, LLC	P	VARIOUS	VARIOUS
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 59,992.			59,992.
b 24,721.			24,721.
c 43,721.			43,721.
d 138,918.			138,918.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			59,992.
b			24,721.
c			43,721.
d			138,918.
e			

2 Capital gain net income or (net capital loss) If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	267,352.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 	3	0.

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2011	2,296,255.	27,299,825.	0.084112
2010	3,698,840.	32,859,552.	0.112565
2009	1,038,618.	27,849,612.	0.037294
2008	3,467,699.	26,742,071.	0.129672
2007	3,557,186.	13,945,600.	0.255076

2 Total of line 1, column (d)	2	0.618719
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.123744
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	30,601,729.
5 Multiply line 4 by line 3	5	3,786,780.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,760.
7 Add lines 5 and 6	7	3,793,540.
8 Enter qualifying distributions from Part XII, line 4	8	2,757,027.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

Part VII Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary – see instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	13,520.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	13,520.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	13,520.
6 Credits/Payments			
a 2012 estimated tax pmts and 2011 overpayment credited to 2012	6 a	14,343.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	14,343.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	823.	
11 Enter the amount of line 10 to be Credited to 2013 estimated tax	11	823.	Refunded

Part VIII Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) WI		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	X	
14	The books are in care of DAVID J. LUBAR Telephone no 414-291-9000 Located at 700 N. WATER ST., SUITE 1200 MILWAUKEE WI ZIP + 4 53202			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here N/A and enter the amount of tax-exempt interest received or accrued during the year 15 N/A			
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If 'Yes,' enter the name of the foreign country N/A	16		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

	Yes	No
1 a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No		
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 1 b N/A		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012? 1 c X		
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? ☐ Yes ☒ No If 'Yes,' list the years 20 20 20 20		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement – see instructions) 2 b N/A		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 20 20 20		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If 'Yes,' did it have excess business holdings in 2012 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2012) 3 b N/A		
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4 a X		
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012? 4 b X		

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5 a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5 b

N/A

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?N/A ☐ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d)

6 a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6 b

X

If 'Yes' to 6b, file Form 8870

7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7 b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MARIANNE S. LUBAR 700 N. WATER ST. MILWAUKEE, WI 53202	PRESIDENT 1.00	0.	0.	0.
SHELDON B. LUBAR 700 N. WATER ST. MILWAUKEE, WI 53202	CHAIRMAN 2.00	0.	0.	0.
DAVID M. BAUER 700 N. WATER ST. MILWAUKEE, WI 53202	TREASURER 2.00	0.	0.	0.
DAVID J. LUBAR 700 N. WATER ST. MILWAUKEE, WI 53202	DIRECTOR 1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes	1 a	2,157,888.
a	Average monthly fair market value of securities	1 b	1,591,025.
b	Average of monthly cash balances	1 c	27,318,832.
c	Fair market value of all other assets (see instructions)	1 d	31,067,745.
d	Total (add lines 1a, b, and c)		
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	31,067,745.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	466,016.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	30,601,729.
6	Minimum investment return. Enter 5% of line 5	6	1,530,086.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	1,530,086.
2 a	Tax on investment income for 2012 from Part VI, line 5	2 a	13,520.
b	Income tax for 2012. (This does not include the tax from Part VI.)	2 b	
c	Add lines 2a and 2b	2 c	13,520.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,516,566.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	1,516,566.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,516,566.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1 a	2,757,027.
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1 b	
b	Program-related investments — total from Part IX-B	2	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes		
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,757,027.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,757,027.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				1,516,566.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years: 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007	3,100,334.			
b From 2008	2,268,982.			
c From 2009				
d From 2010	2,064,684.			
e From 2011	946,835.			
f Total of lines 3a through e	8,380,835.			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 2,757,027.				
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required – see instructions)		0.		
c Treated as distributions out of corpus (Election required – see instructions)	0.			
d Applied to 2012 distributable amount				1,516,566.
e Remaining amount distributed out of corpus	1,240,461.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))		0.		0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	9,621,296.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount – see instructions		0.		
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount – see instructions			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	3,100,334.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	6,520,962.			
10 Analysis of line 9:				
a Excess from 2008	2,268,982.			
b Excess from 2009				
c Excess from 2010	2,064,684.			
d Excess from 2011	946,835.			
e Excess from 2012	1,240,461.			

BAA

Form 990-PF (2012)

Part XIV	Private Operating Foundations (see instructions and Part VII-A, question 9)
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N/A

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling

- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

- 2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

[illegible]

- b 85% of line 2a

- c Qualifying distributions from Part XII,
line 4 for each year listed

- d**
- Amounts included in line 2c not used directly for active conduct of exempt activities

- e** Qualifying distributions made directly for active conduct of exempt activities
Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon:

- a 'Assets' alternative test – enter:

- (1) Value of all assets.

- (2) Value of assets qualifying under section 4942(i)(3)(B)(i)

- b** 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c 'Support' alternative test – enter

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization**

- (4) Gross investment income**

Part XV **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

- a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

SEE STATEMENT 7

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

- a The name, address, and telephone number or e-mail of the person to whom applications should be addressed

- b** The form in which applications should be submitted and information and materials they should include

- c Any submission deadlines.

- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED STATEMENT ,			THESE CONTRIBUTIONS ARE UNRESTRICTED GIFTS TO PUBLIC CHARITIES AND PRIVATE OPERATING FOUNDATIONS.	2,757,027.
Total			3 a	2,757,027.
b Approved for future payment				
Total			3 b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	331,986.	
4	Dividends and interest from securities			14	172,052.	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income			14	-30,096.	
8	Gain or (loss) from sales of assets other than inventory			18	267,352.	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a						
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				741,294.	
13	Total. Add line 12, columns (b), (d), and (e)					741,294.

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► **Attach to Form 990, Form 990-EZ, or Form 990-PF**

OMB No 1545-0047

2012

Name of the organization

THE LUBAR FAMILY FOUNDATION, INC.

Employer identification number

39-1098690

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$

Caution: An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it **must** answer 'No' on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on Part I, line 2, of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

Name of organization

Employer identification number

THE LUBAR FAMILY FOUNDATION, INC.

39-1098690

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	SHELDON B. LUBAR 700 N. WATER STREET, STE 1200 MILWAUKEE, WI 53202	\$ 1,064,140.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
2	MARIANNE S. LUBAR 700 N. WATER STREET, STE 1200 MILWAUKEE, WI 53202	\$ 1,064,140.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
3	KRISTINE LUBAR MACDONALD 700 N. WATER STREET, STE 1200 MILWAUKEE, WI 53202	\$ 703,500.	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
4	DAVID J. LUBAR 700 N. WATER STREET, STE 1200 MILWAUKEE, WI 53202	\$ 439,700.	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
5	SUSAN LUBAR SOLVANG 700 N. WATER STREET, STE 1200 MILWAUKEE, WI 53202	\$ 463,700.	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)
6	JOAN P. LUBAR 700 N. WATER STREET, STE 1200 MILWAUKEE, WI 53202	\$ 927,200.	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)

Name of organization

Employer identification number

THE LUBAR FAMILY FOUNDATION, INC.

39-1098690

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	77,000 SHARES XTXI STOCK		
		\$ 1,064,140.	12/19/12
2	77,000 SHARES XTXI STOCK		
		\$ 1,064,140.	12/19/12
3	25,000 SHARES XTXI STOCK		
		\$ 350,000.	12/21/12
4	15,000 SHARES XTXI STOCK		
		\$ 210,000.	12/21/12
5	15,000 SHARES XTXI STOCK		
		\$ 210,000.	12/21/12
6	40,000 SHARES XTXI STOCK		
		\$ 560,000.	12/21/12

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2012)

Name of organization

THE LUBAR FAMILY FOUNDATION, INC.

Employer identification number

39-1098690

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8) or (10)**organizations that total more than \$1,000 for the year.** Complete columns (a) through (e) and the following line entryFor organizations completing Part III, enter total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.)

► \$ N/A

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

THE LUBAR FAMILY FOUNDATION, INC.

39-1098690

STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
OTHER INVESTMENT INCOME	\$ -30,096.	\$ -30,096.	
TOTAL	\$ -30,096.	\$ -30,096.	0.

STATEMENT 2
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	\$ 6,860.	\$ 941.		
TOTAL	\$ 6,860.	\$ 941.	\$ 0.	\$ 0.

STATEMENT 3
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	\$ 20,000.			
FOREIGN TAXES PAID	3,272.	\$ 3,272.		
TOTAL	\$ 23,272.	\$ 3,272.	\$ 0.	\$ 0.

STATEMENT 4
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS EXPENSES	\$ 230.	\$ 31.		
PORTFOLIO DEDUCTIONS	61,030.	61,030.		
TOTAL	\$ 61,260.	\$ 61,061.	\$ 0.	\$ 0.

THE LUBAR FAMILY FOUNDATION, INC.

39-1098690

STATEMENT 5
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

<u>CORPORATE STOCKS</u>	<u>VALUATION METHOD</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
CROSSTEX ENERGY INC.	COST	\$ 5,055,782.	\$ 5,403,312.
	TOTAL	<u>\$ 5,055,782.</u>	<u>\$ 5,403,312.</u>

STATEMENT 6
FORM 990-PF, PART II, LINE 15
OTHER ASSETS

	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
LUBAR CHARITABLE PUBLIC EQUITY FUND	\$ 9,943,061.	\$ 10,794,630.
LUBAR CHARITABLE TAXABLE FUND	15,559,929.	15,852,498.
STATE OF ISRAEL BONDS	500,000.	500,000.
TOTAL	<u>\$ 26,002,990.</u>	<u>\$ 27,147,128.</u>

STATEMENT 7
FORM 990-PF, PART XV, LINE 1A
FOUNDATION MANAGERS - 2% OR MORE CONTRIBUTORS

MARIANNE S. LUBAR
 SHELDON B. LUBAR
 DAVID J. LUBAR

Year Ended

FORM 990-PF, PART XV, SUPPLEMENTARY INFORMATION

Public Charities

The following gifts are fbo the Jewish Federation and Jewish Related Organizations:

Beth El Temple	East Hartford, CT	\$ 500
Center for Jewish Studies - Excellence Fund	Madison, WI	500
Congregation Sinai	Milwaukee, WI	23,200
Jewish Community Action (MPLS)	St Paul, MN	1,000
Jewish Family Services	Milwaukee, WI	700
Jewish Family & Children's Serices	Minneapolis, MN	2,500
Jewish National Fund	Milwaukee, WI	250
Jewish Museum Milwaukee (program of MJF)	Milwaukee, WI	44,867
Lake Park Synagogue	Milwaukee, WI	540
Lubavitch of Wisconsin	Milwaukee, WI	7,000
Milwaukee Alliance for Jewish Reconnection (MAJOR)	Milwaukee, WI	5,000
Milwaukee Jewish Federation	Milwaukee, WI	355,500
Milwaukee Jewish Free Loan Association	Milwaukee, WI	400
Minneapolis Jewish Federation Annual Fund	Minnetonka, MN	171,000
Jewish Community Center of Greater Minneapolis (Sabes JCC)	Minneapolis, MN	20,000
Tikkum Ha-ir of Milwaukee	Milwaukee, WI	1,000
The Birthright Israel Fund	New York, NY	5,000
Yeshiva Elementary School	Milwaukee, WI	20,000

The following gifts are related to the arts, culture, and the outdoors:

Anderson Ranch Arts Center	Aspen, CO	3,000
Aspen Institute	Aspen, CO	20,000
Aspen Music Festival & School	Aspen, CO	4,800
Brewers Community Foundation	Milwaukee, WI	1,000
Central Cross Country Ski Association	Verona, WI	20,000
Channel 10/36 Friends (MPTV Friends, Inc)	Milwaukee, WI	200
Charles E Kubly Foundation	Milwaukee, WI	500
Danceworks, Inc	Milwaukee, WI	1,000
88Nine Radio Milwaukee	Milwaukee, WI	1,000
First Stage Milwaukee, Inc Performing Arts Center	Milwaukee, WI	5,000
Florentine Opera Company Inc	Milwaukee, WI	41,250
Friends of Golda Meier Library	Milwaukee, WI	1,000
Friends of Schlitz Audubon Center Inc	Milwaukee, WI	1,000
Ice Age Trail Alliance	Madison, WI	2,500
Sheboygan Arts Foundation Inc (John Michael Kohler Arts Center)	Sheboygan, WI	1,000
MIAD (Milwaukee Institute of Art & Design)	Milwaukee, WI	22,500
Milwaukee Art Museum Inc	Milwaukee, WI	151,050
Milwaukee Ballet Company Inc	Milwaukee, WI	15,700
Milwaukee Chamber Theatre	Milwaukee, WI	5,000
Milwaukee Film Inc	Milwaukee, WI	75,000
Milwaukee Public Library Foundation	Milwaukee, WI	1,500
Milwaukee Public Museum	Milwaukee, WI	10,500
Milwaukee Repertory Theater Inc	Milwaukee, WI	5,000
Mountain Rescue	Aspen, CO	100

LUBAR FAMILY FOUNDATION, INC.
Milwaukee, WI 53202
Federal Form 990-PF

39-1098690
12/31/2012

Year Ended

FORM 990-PF, PART XV, SUPPLEMENTARY INFORMATION

Next Act Theatre Inc.	Milwaukee, WI	12,000
Racine Art Museum	Racine, WI	1,500
Renaissance Theatreworks	Milwaukee, WI	2,250
Riveredge Nature Center Inc	Newburg, WI	250
Roaring Fork Outdoors	Basalt, CO	100
Sharon Lynne Wilson Center for the Arts Inc	Brookfield, WI	1,000
Symphony Friends	Milwaukee, WI	100,200
Theatre Gigante	Milwaukee, WI	250
Theatre Masters	Aspen, CO	2,500
United Performing Arts Fund Inc	Milwaukee, WI	38,350
WUWM	Milwaukee, WI	7,800
Wisconsin Academy Foundation	Madison, WI	5,000
Wisconsin Historical Foundation Inc	Madison, WI	1,000
Wisconsin Playground Warriors	Milwaukee, WI	2,610
Wisconsin Public Radio	Madison, WI	1,000

The following gifts are related to community, health and welfare organizations:

ABCD	Glendale, WI	1,000
Battle Cross, Ltd	Muskego, WI	1,000
Boys and Girls Club of Greater Milwaukee Inc	Milwaukee, WI	500
Boy Scouts of America	Milwaukee, WI	1,000
Childrens Outing Assn	Milwaukee, WI	500
City Year Milwaukee	Milwaukee, WI	25,000
Center for Science in the Public Interest (CSPI)	Washington, DC	1,500
Grand Avenue Club	Milwaukee, WI	200
Greater Milwaukee Committee	Milwaukee, WI	2,860
Greater Milwaukee Foundation Inc	Milwaukee, WI	1,000
Junior Achievement of Wisconsin, Inc	Milwaukee, WI	25,000
Juvenile Diabetes Research Foundation	Milwaukee, WI	350
The Leukemia & Lymphoma Society	Brookfield, WI	150
LICS Milwaukee	Milwaukee, WI	1,000
National MS Society	Hartland, WI	100
Our Next Generation	Milwaukee, WI	2,000
Planned Parenthood Minnesota South Dakota North Dakota	St Paul, MN	85,000
Planned Parenthood of Wisconsin Inc.	Milwaukee, WI	100,000
Prevent Blindness	Milwaukee, WI	100
Health Care Network (Racine)	Racine, WI	200
St. Coletta of Wisconsin	Jefferson, WI	200
St Francis Children's Center	Milwaukee, WI	1,000
Sarah Chudnow Senior Living Center (Jewish Home & Care Center For Mequon, WI	Mequon, WI	200
United Way of Greater Milwaukee	Milwaukee, WI	258,500
Urban Ecology Center	Milwaukee, WI	100,000
Waukesha County Community Foundation	Waukesha, WI	100
Wisconsin Women's Network	Madison, WI	100

LUBAR FAMILY FOUNDATION, INC.
Milwaukee, WI 53202
Federal Form 990-PF

39-1098690
12/31/2012

Year Ended

FORM 990-PF, PART XV, SUPPLEMENTARY INFORMATION

The following gifts are related to universities and other educational institutions:

Bowdoin College Alumni Fund	Brunswick, ME	15,000
Brown Annual Fund	Providence, RI	2,500
Kellogg School of Management	Evanston, IL	7,500
Marquette University	Milwaukee, WI	2,000
Marquette University High School	Milwaukee, WI	5,000
MATC Foundation	Milwaukee, WI	1,500
Milwaukee College Prep School	Milwaukee, WI	50,000
Schools Than Can Milwaukee	Milwaukee, WI	15,000
Teach for America	Milwaukee, WI	5,000
University of Wisconsin Foundation	Madison, WI	755,000
UWM Foundation	Milwaukee, WI	20,500
University School of Milwaukee	Milwaukee, WI	30,100

Private Operating Foundations

The following gifts are related to community, health and welfare organizations:

Growing Minds, Inc (Formerly K12YOGA)	Milwaukee, WI	15,000
---------------------------------------	---------------	--------

GRAND TOTALS \$ 2,757,027

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension – check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions		Employer identification number (EIN) or
	THE LUBAR FAMILY FOUNDATION, INC.		39-1098690
	Number, street, and room or suite number. If a P.O. box, see instructions		Social security number (SSN)
	700 N. WATER ST. -- SUITE 1200		
File by the due date for filing your return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions		
	MILWAUKEE, WI 53202-4206		

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ DAVID J. LUBAR

Telephone No ▶ 414-291-9000 FAX No ▶ _____

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15, 20 13, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ▶ ☒ calendar year 20 12 or
- ▶ ☐ tax year beginning _____, 20 _____, and ending _____, 20 _____

- 2 If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	13,520.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	14,343.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.